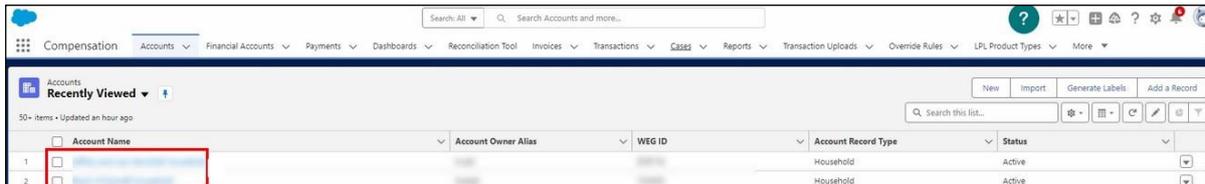


## Process – Advisor Team Submission

### 1. Team Opens Client Refund Case

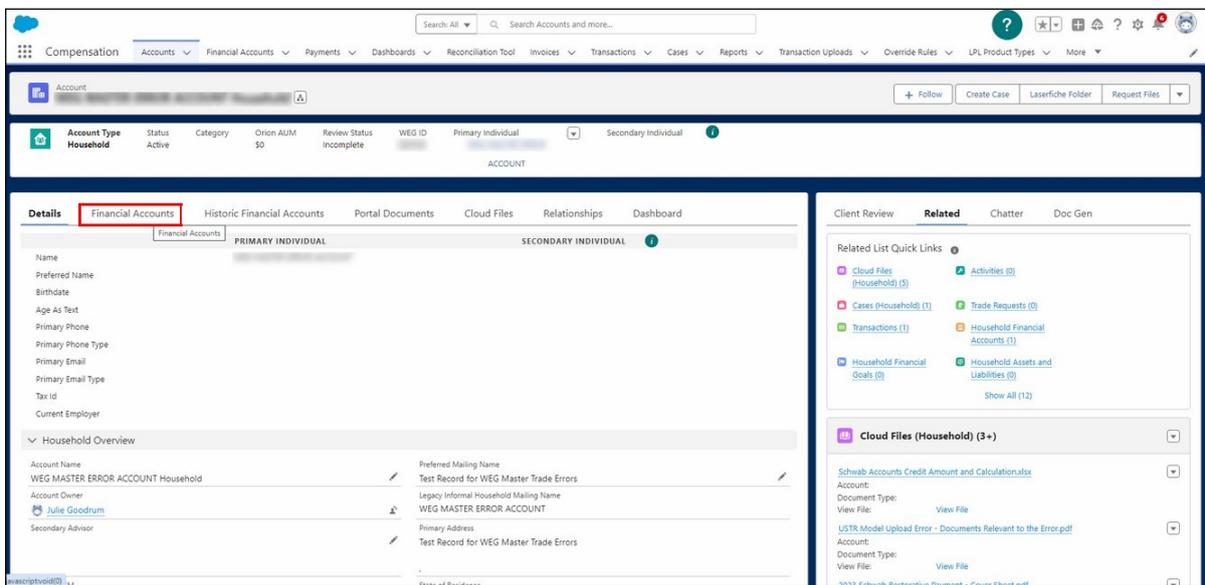


The screenshot shows the Salesforce interface for the 'Accounts' tab, specifically the 'Recently Viewed' list. The list contains two rows of account information. The first row is highlighted with a red box around the 'Account Name' column. The columns include 'Account Name', 'Account Owner Alias', 'WEG ID', 'Account Record Type', and 'Status'. The 'Status' for both accounts is 'Active'.

#### Action Step

1. Launch Salesforce and go to the **Accounts Tab - Recently Viewed** list.
2. Choose an account from the list and double click on the **Account Name** or type in a WEG ID in the **Search Bar** and press **Enter**.

### 2. Client Household | Account | Salesforce screen is displayed.



The screenshot shows the Salesforce interface for a 'Client Household | Account' record. The 'Financial Accounts' tab is selected and highlighted with a red box. The 'Details' section shows information for the 'PRIMARY INDIVIDUAL' and 'SECONDARY INDIVIDUAL'. The 'Household Overview' section lists account details, including 'Account Name', 'Account Owner', and 'Secondary Advisor'. The right-hand side of the screen displays 'Related List Quick Links' and 'Cloud Files (Household) (3+)'. The 'Cloud Files' section shows a list of files, including 'Schwab Accounts Credit Amount and Calculation.xlsx' and 'USTR Model Upload Error - Documents Relevant to the Error.pdf'.

Step	Action
1	Select the <b>Financial Account</b> Tab